

# Data-Driven Storytelling Presentation:

**ACCOUNT PERFORMANCE METRICS AND SALES TREND**

**BY**

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# INTRODUCTION

## Problem Statement

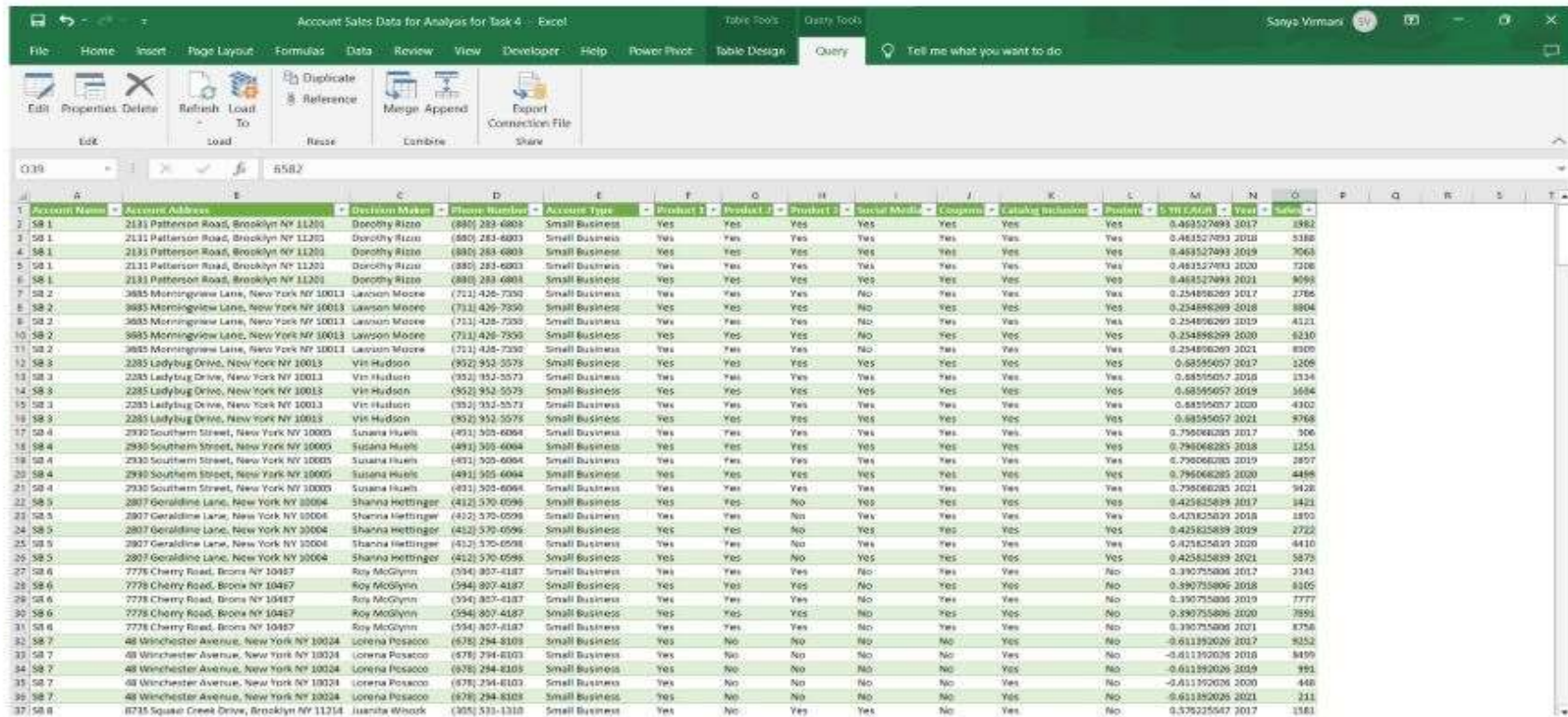
- J.P. Morgan Chase & Co. is a leading global financial services firm that offers services and operates worldwide.
- The company aims to analyze the account performance metrics over the last 5 years (2017-2021) and the factors contributing to its compound annual growth rate (CAGR) in unit sales. This includes identifying opportunities for further improvement.

## Business Questions

- Examining the total unit sales for each year.
- Analyzing the year-over-year growth in sales.
- Identifying which account types are surpassing others in terms of unit sales.
- Calculating the average 5-year compound annual growth rate (CAGR) based on different account types.
- Evaluating the top-performing and bottom-performing accounts

# DATA MODELLING

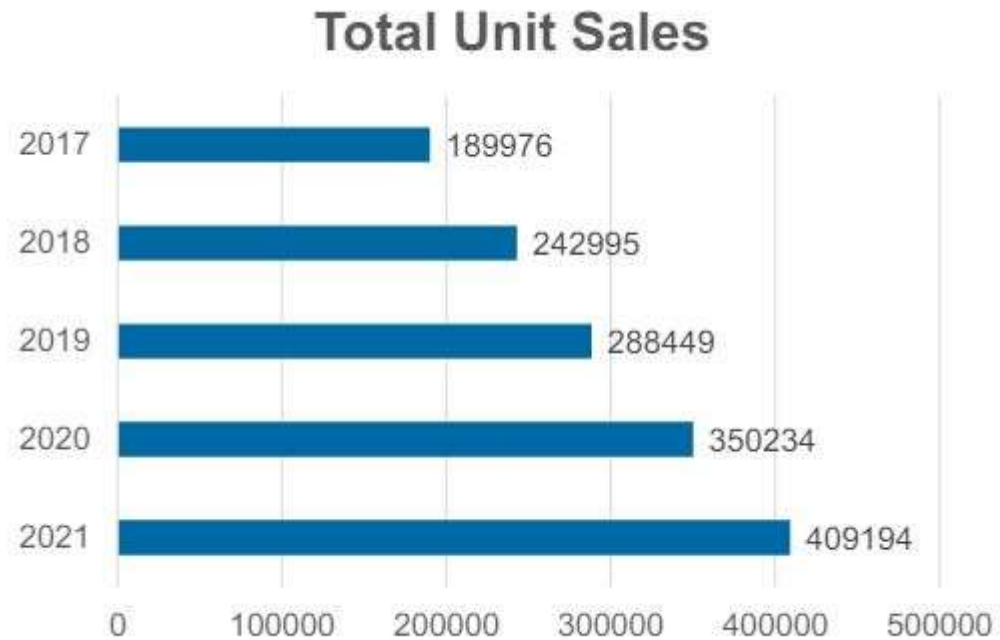
Utilizing Power Query in MS-Excel, transformed the data for improved organization, giving a more structured foundation for necessary analysis.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	Account Name	Account Address	Decision Maker	Phone Number	Account Type	Product 1	Product 2	Product 3	Social Media	Coupons	Catalogs	Business	Product	5TH LAGR	Year	Sales				
1	58.1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(888) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.4695274993	2017	1882				
2	58.1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(888) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.4695274993	2018	5388				
3	58.1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(888) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.4695274993	2019	7068				
4	58.1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(888) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.4695274993	2020	7208				
5	58.1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(888) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.4695274993	2021	8099				
6	58.2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7330	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	0.254898269	2017	2786				
7	58.2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7330	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	0.254898269	2018	8804				
8	58.2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7330	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	0.254898269	2019	4121				
9	58.2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7330	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	0.254898269	2020	6230				
10	58.2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7330	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	0.254898269	2021	8300				
11	58.3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(852) 932-5575	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.88555657	2017	1206				
12	58.3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(852) 932-5575	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.88555657	2018	1334				
13	58.3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(852) 932-5575	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.88555657	2019	1694				
14	58.3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(852) 932-5575	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.88555657	2020	4302				
15	58.3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(852) 932-5575	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.88555657	2021	8768				
16	58.4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6094	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2017	306				
17	58.4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6094	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2018	1251				
18	58.4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6094	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2019	2807				
19	58.4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6094	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2020	4488				
20	58.4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6094	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2021	9428				
21	58.5	2807 Geraldine Lane, New York NY 10004	Shanna Hettlinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	0.425815839	2017	1421				
22	58.5	2807 Geraldine Lane, New York NY 10004	Shanna Hettlinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	0.425815839	2018	1850				
23	58.5	2807 Geraldine Lane, New York NY 10004	Shanna Hettlinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	0.425815839	2019	2722				
24	58.5	2807 Geraldine Lane, New York NY 10004	Shanna Hettlinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	0.425815839	2020	4410				
25	58.5	2807 Geraldine Lane, New York NY 10004	Shanna Hettlinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	0.425815839	2021	5875				
26	58.6	7778 Cherry Road, Bronx NY 10487	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	No	0.390715806	2017	2141				
27	58.6	7778 Cherry Road, Bronx NY 10487	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	No	0.390715806	2018	8305				
28	58.6	7778 Cherry Road, Bronx NY 10487	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	No	0.390715806	2019	7777				
29	58.6	7778 Cherry Road, Bronx NY 10487	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	No	0.390715806	2020	7891				
30	58.6	7778 Cherry Road, Bronx NY 10487	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	No	0.390715806	2021	8756				
31	58.7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(878) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	No	-0.611392026	2017	8252				
32	58.7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(878) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	No	-0.611392026	2018	8499				
33	58.7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(878) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	No	-0.611392026	2019	8991				
34	58.7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(878) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	No	-0.611392026	2020	448				
35	58.7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(878) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	No	-0.611392026	2021	211				
36	58.7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(878) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	No	-0.611392026	2022	211				
37	58.8	8735 Square Creek Drive, Brooklyn NY 11214	Juanita Wozok	(305) 533-1310	Small Business	Yes	No	Yes	Yes	No	Yes	No	No	0.576225547	2017	1581				

## DATA ANALYSIS & VISUALIZATION

- Overall, our unit sales growth has been good, with a 5- year CAGR of 21%



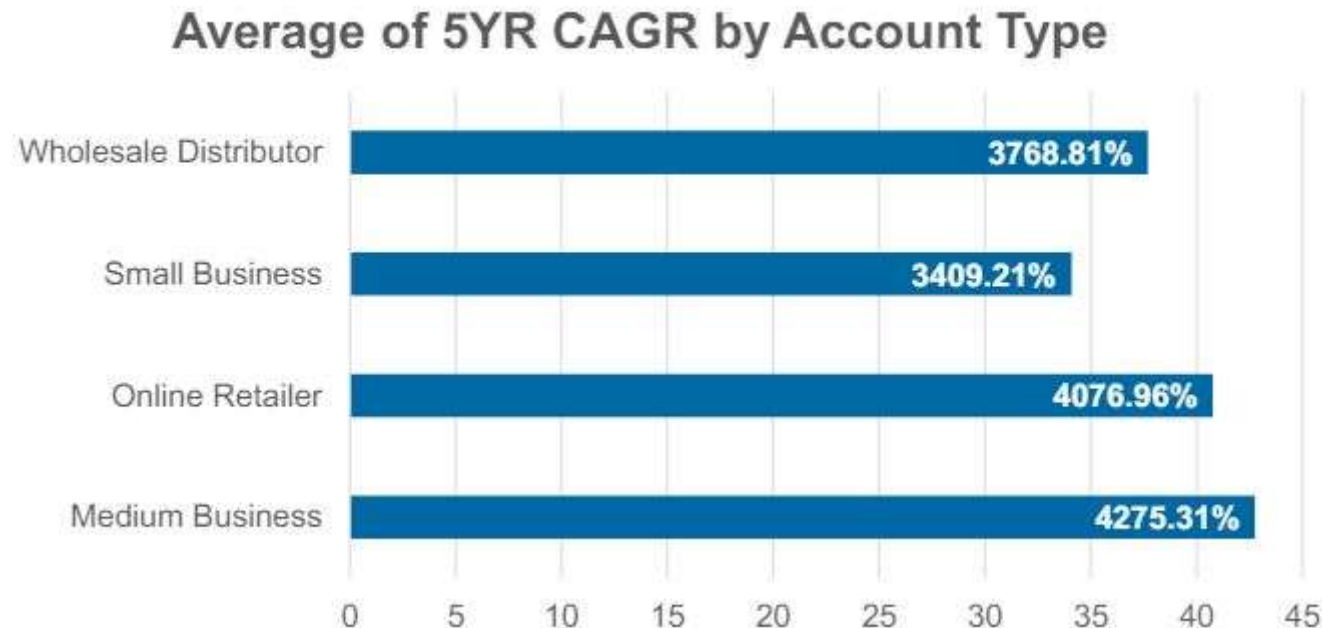
## DATA ANALYSIS & VISUALIZATION

- Directing our sales resources and adjusting our sales mix towards online retailer accounts could lead to enhanced sales growth.



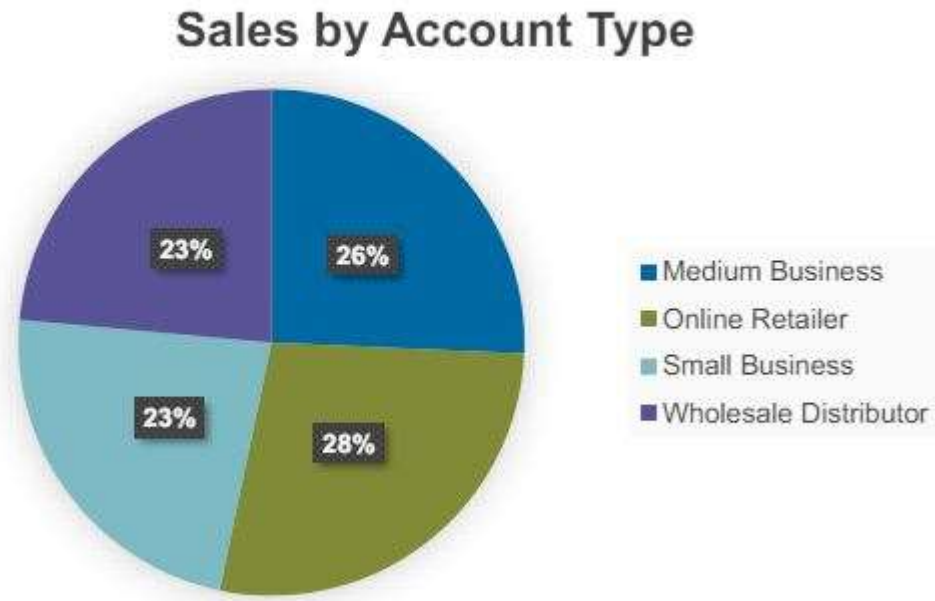
## DATA ANALYSIS & VISUALIZATION

- However, Medium Business account type is experiencing higher profitability driven by the average 5-year CAGR.



## DATA ANALYSIS & VISUALIZATION

- Online Retailer generated the highest sales volume, totaling 408,515 units, which accounts for 28% of the total sales volume. Medium Business followed closely with a sales volume of 380,568 units, making up 26% of the total sales volume.



# DATA ANALYSIS & VISUALIZATION

- The account name MB4 proved to be the highest-performing account, achieving an impressive sales volume of approximately 39,413 units.
- On the other hand, accounts WD11, WD1, and SB10 performed at the lowest level in terms of sales volume. Specifically, WD11 accounted for 8,676 units, WD1 for 10,574 units, and SB10 for 16,060 units, all in terms of sales volume





# SUMMARY

- Despite satisfactory overall sales performance, there is ample room for significant improvement.
- Discontinuing poorly performing accounts would free up valuable sales and marketing resources.
- Notably, the past five years have witnessed the most robust sales growth in the online retailer account category.
- By reallocating the resources saved from closing underperforming accounts to online retailer accounts, sales growth could be maximized.
- It is advisable to promptly close these underperforming accounts and launch an initiative to identify high-potential online retailer accounts deserving of increased sales and marketing focus.